



Planning *Points*

Our Office

“Exclusive Peace of Mind”

GEOFFREY W. WHITE
BARRISTER & SOLICITOR
ESTATE & CHARITY LAW

What do we do?

Our office is one of BC's only law firms that is exclusively focused on Estate, Tax & Charity Law.

Our primary services include:

- estate planning strategies,
- quick and tax-efficient resolutions of estates, and
- advocacy for executors or beneficiaries to protect their rights within an estate.

What is our background?

Geoffrey W. White is the principal of the firm. He is a member of both the BC and Ontario law societies. He holds a Bachelor's degree in Business Administration and has received top legal honours in Wills, Estates, Family Property Law and Client Counselling. He is also a registered Trust & Estate Practitioner. Geoffrey is a frequent guest speaker regarding estate matters at professional meetings and conferences.

Why do I need a strategy?

Unfortunately, most estate plans are just a basic Will. These Wills do little more than record your goals (eg. benefit my spouse or alternately my children). These Wills do not consider Tax laws, Family laws or Probate laws. They will also not help if you become seriously ill.

Our clients consistently find they can do much better than "just a basic Will." Higher net worth clients create substantial tax savings for their estate

and beneficiaries. Even our modest net worth clients create savings by avoiding “hidden” future estate expenses such as probate and legal fees.

Explanations

We ensure that we fully explain our services to you - in plain language you can understand.

Expectations

After our initial consultation, we will recommend a range of strategies. We will give you a binding estimate of our fee for each strategy. You select the recommendation that makes sense for you. You will know exactly what we are doing for you, when it will happen and how much it will cost.

Benefits

In describing our recommendations we are careful to describe the benefits and costs in terms of dollars saved and goals accomplished. We want you to be able to make fully informed decisions.

Communication

Our office is available through many forms of communication including phone, fax and e-mail. Contact us anytime. If you don't reach us immediately, we are committed to returning your call within 24 hours.

Our logo?

We are sometimes asked about our logo (in the top left corner). The teacup and glasses represent heirlooms

-- those treasured possessions that represent memories our clients wish to leave as legacies.

Most of our time is spent designing strategies to save taxes and protect beneficiaries. Yet, we realize that just like the teacup and glasses, these strategies are only tools. What really matters is the lasting legacies that these tools create. Our job is to help you use strategies to create an estate plan that gives you the comfort and security that your loved ones are well looked after.

Other Professionals

A good estate plan uses a team approach. We prefer to work with your advisers. As a result, we maintain close relationships with many professional accountants, lawyers, insurance advisors, and financial planners. In fact, most of our clients are referred to us by other professionals.

Why Bother?

Many people delay their estate planning until an unfortunate event reminds them of the need. Sometimes it is too late. Don't wait.

Our depth of experience and unique heritage offices create a comfortable environment for exploring your goals and needs. Together, we will fine-tune a strategy that gives you a valuable return on your investment and, most importantly, peace of mind.

We look forward to meeting you.